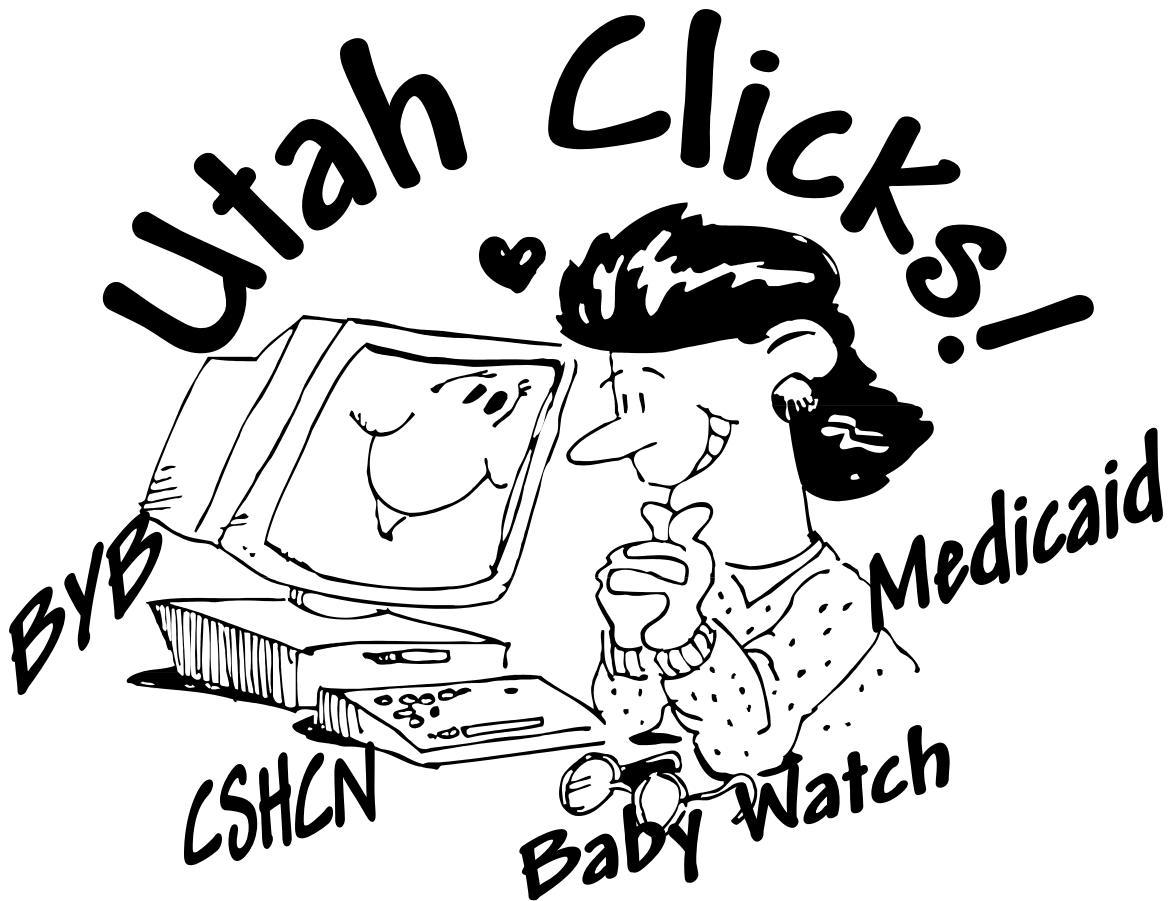


8/2/2005

Utah Clicks
Training Manual
For Office Administrators

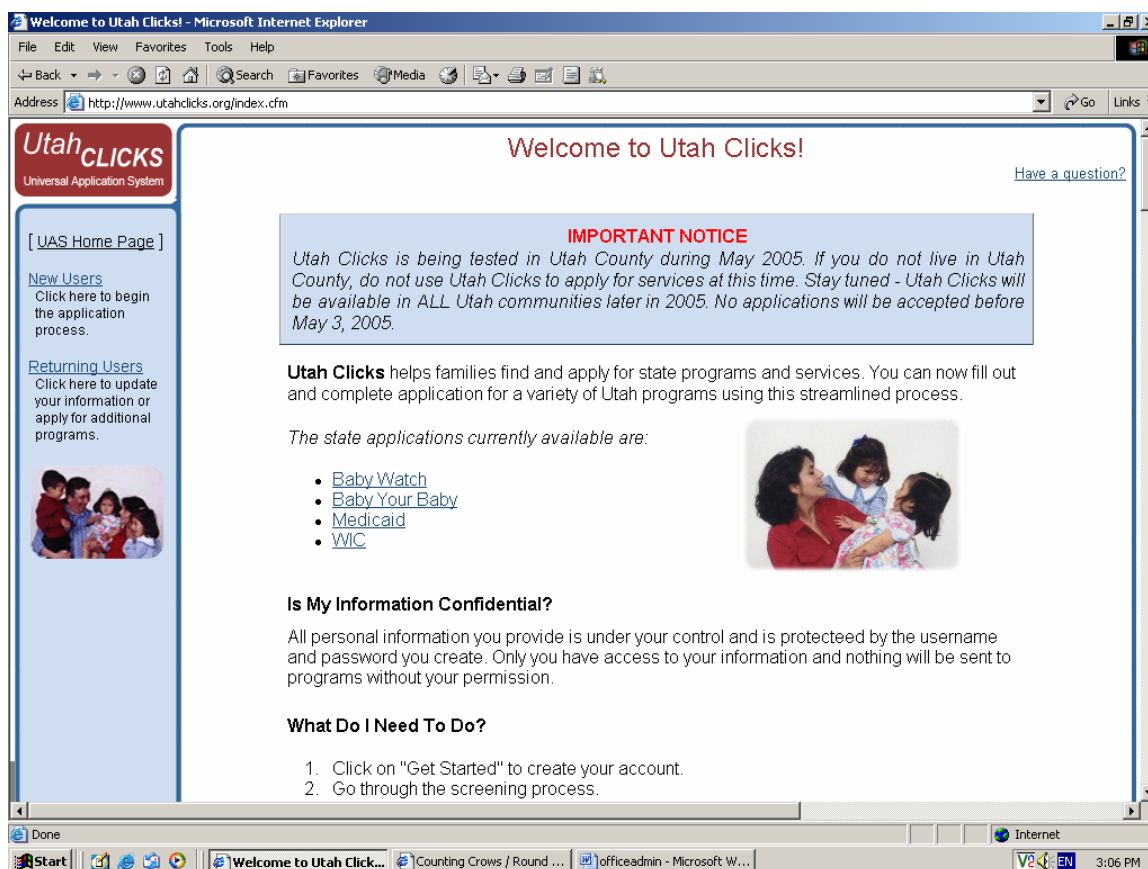


CHAPTER ONE: INTRODUCTION

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SECTION 1: OFFICE ADMINISTRATOR ROLES

SECTION 2: NAVIGATION LINKS



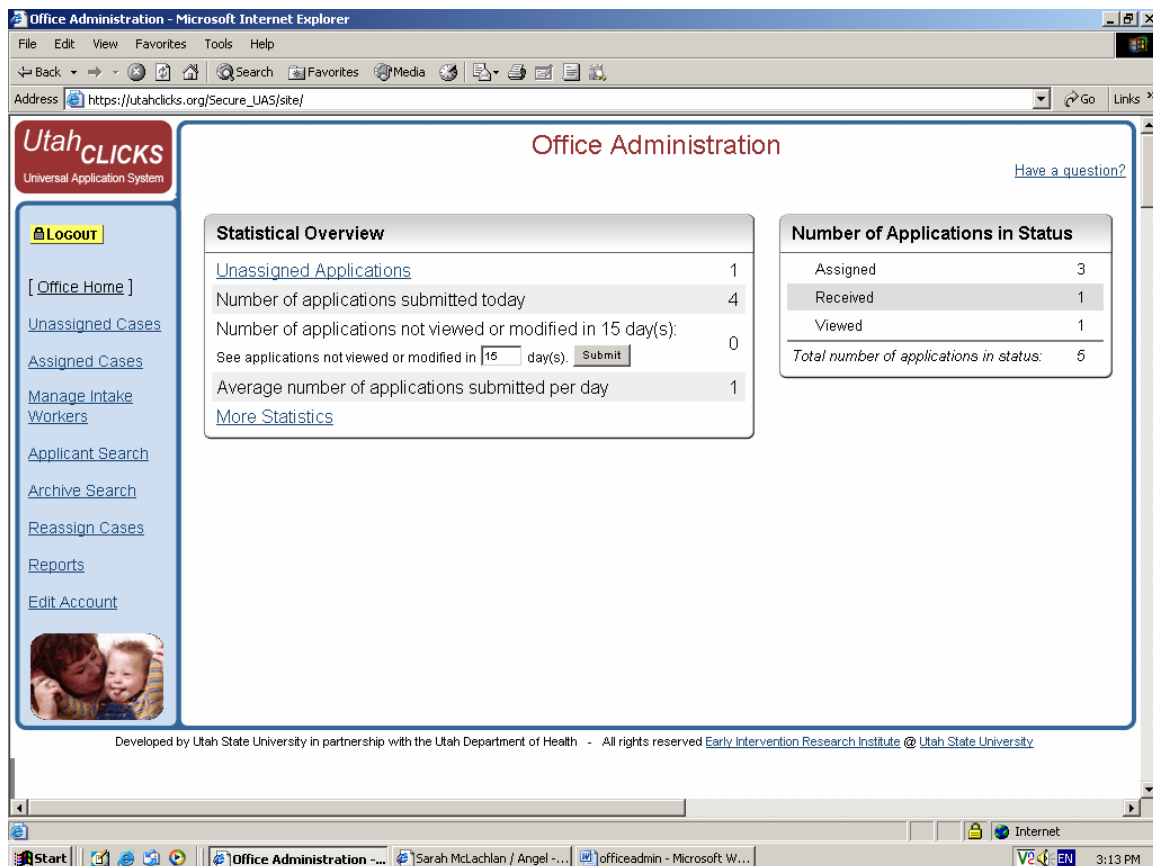
Home Page

- To **log in for the first time**, click on New Users.
- To **log in as an existing user** (including site managers, case workers, applicants), click on Returning Users.
- To report a problem, send a comment, or ask a question about the Utah Clicks, click on the “Have a question?” link at the top right corner of the screen.



Returning User Login

- Enter your User Name.
- Enter your User Password. NOTE: Click on “Forget your password?” to receive assistance with accessing your password.
- Click Login to continue.
- To **return to the home page**, click on the Utah Clicks emblem in the upper left corner of the screen.



Office Administration Home Page

Main Screen:

- To **view unassigned applications**, click on Unassigned Applications on the main screen OR click on Unassigned Cases on the left sidebar.
- To **view applications not viewed or modified for a specific time period** (i.e., last 5 days, last 7 days, etc.), enter the preferred number of days in the box under “Number of applications not viewed or modified...” and click Submit.
- To **view other statistical reports** regarding application transactions, click on More Statistics.

Sidebar:

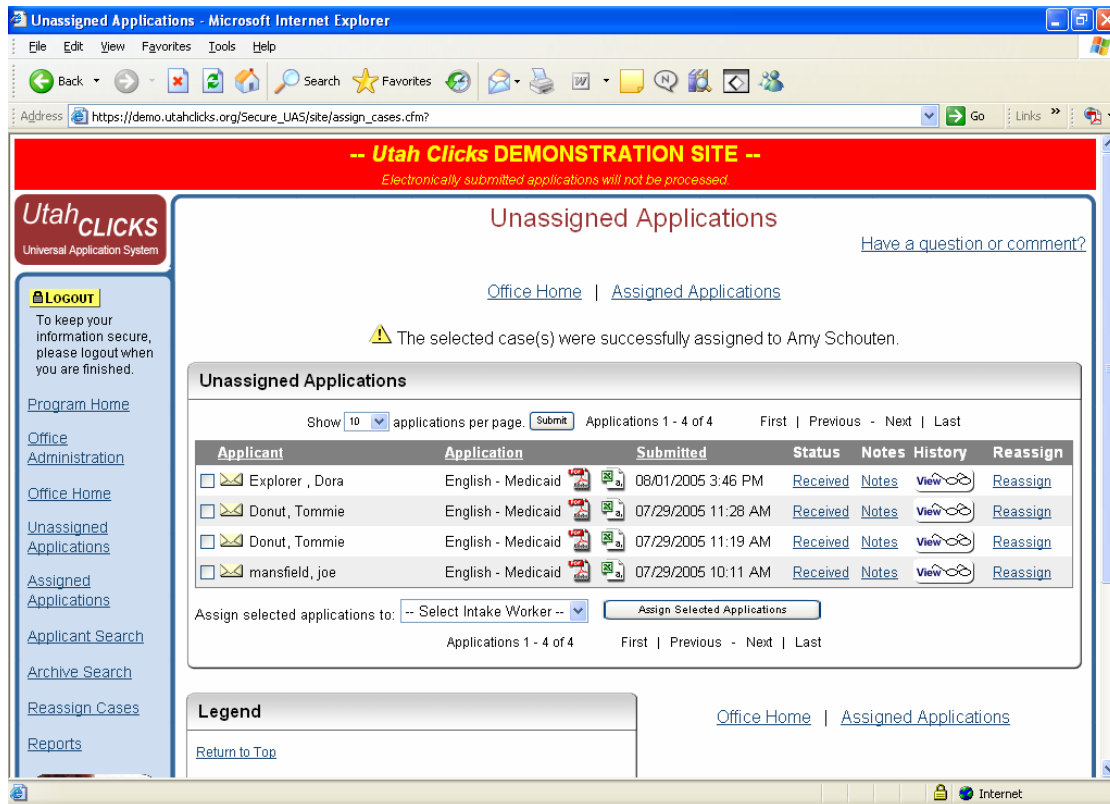
- To **view unassigned applications**, click on Unassigned Cases.
- To **view assigned applications**, click on Assigned Cases.
- To **manage intake workers** (i.e., create a new intake worker, edit intake worker information, delete a intake worker), click on Manage Intake Workers.
- To **search for a case by applicant information**, click on Applicant Search.
- To **search archived applications** by either applicant information or assigned intake worker, click on Archive Search.
- To **reassign cases to another office**, click Reassign Cases.
- To **view other statistical reports** regarding application transactions, click on Reports.

- To **edit office administrator account information** (i.e., email address, user name, password), click Edit Account.
- To **return to the home page**, click on the UAS emblem in the upper left corner of the screen.
- To **log out of the system**, click on Logout.

CHAPTER TWO: MANAGING CASES

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Section 5: Monitoring Office Statistics.....	15
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Section 1: Viewing Unassigned Cases:



Unassigned Applications - Microsoft Internet Explorer

Address: https://demo.utahclicks.org/Secure_UAS/site/assign_cases.cfm?

-- Utah Clicks DEMONSTRATION SITE --
Electronically submitted applications will not be processed.

Utah Clicks
Universal Application System

Logout
To keep your information secure, please logout when you are finished.

[Program Home](#)
[Office Administration](#)
[Office Home](#)
[Unassigned Applications](#)
[Assigned Applications](#)
[Applicant Search](#)
[Archive Search](#)
[Reassign Cases](#)
[Reports](#)

Unassigned Applications

[Office Home](#) | [Assigned Applications](#)

⚠ The selected case(s) were successfully assigned to Amy Schouten.

Unassigned Applications

Show 10 applications per page. [Submit](#) Applications 1 - 4 of 4 First | Previous - Next | Last

Applicant	Application	Submitted	Status	Notes	History	Reassign
<input type="checkbox"/> Explorer, Dora	English - Medicaid	08/01/2005 3:46 PM	Received	Notes	View	Reassign
<input type="checkbox"/> Donut, Tommie	English - Medicaid	07/29/2005 11:28 AM	Received	Notes	View	Reassign
<input type="checkbox"/> Donut, Tommie	English - Medicaid	07/29/2005 11:19 AM	Received	Notes	View	Reassign
<input type="checkbox"/> mansfield, joe	English - Medicaid	07/29/2005 10:11 AM	Received	Notes	View	Reassign

Assign selected applications to: -- Select Intake Worker -- [Assign Selected Applications](#)

Applications 1 - 4 of 4 First | Previous - Next | Last

Legend

[Return to Top](#)

[Office Home](#) | [Assigned Applications](#)

Viewing Unassigned Applications (from main screen or sidebar)

Screen for Unassigned Cases

You can view unassigned cases from the left sidebar or from the main screen.

Section 2: Viewing Assigned Cases:

The screenshot shows a web browser window titled "Assigned Cases - Microsoft Internet Explorer". The address bar displays "http://129.123.52.15/Secure_UAS/site/get_cases.cfm?cases=2". The page features a sidebar on the left with the "UtahCLICKS Universal Application System" logo and a "Logout" button. Below these are several navigation links: "Office Home", "Unassigned Cases", "[Assigned Cases]" (highlighted), "Manage Intake Workers", "Applicant Search", "Archive Search", "Reassign Cases", "Reports", and "Edit Account". At the bottom of the sidebar is a small photo of a family.

The main content area is titled "Assigned Cases" and includes a link "Have a question?". Below this are two links: "Office Home" and "Unassigned Cases". A central box titled "Select an Intake Worker" contains the instruction "Click the name of the intake worker to view the cases assigned to them." Below this instruction is a table with two columns: "Intake Worker" and "Number of Cases".

Intake Worker	Number of Cases
Angeles, Victor	(4)
Fox, Darren	(0)
Green, Rochelle	(0)
Guest, Office	(0)
Hood, Evelyn	(0)
Ongoongotau, Simone	(0)
Palmer, Leilani	(0)
Parke, Dana	(0)
Spafford, Kelly	(0)

Below the table are the same two links: "Office Home" and "Unassigned Cases". At the bottom of the page, a footer states: "Developed by Utah State University in partnership with the Utah Department of Health - All rights reserved [Early Intervention Research Institute @ Utah State University](#)". The Windows taskbar at the bottom shows the Start button, several application icons, and the system clock displaying "10:43 AM".

Viewing Assigned Cases (from the sidebar)

- To **view assigned cases**, click on a highlighted intake worker's name.
- To **view unassigned cases**, click on Unassigned Cases on either the main screen or side bar links.
- To **return to the Office Administrator Home Page**, click on Office Home on either the main screen or side bar links.

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Universal Application System

[Logout](#)

[Office Home](#)
[Unassigned Cases](#)
[Assigned Cases](#)
[Manage Intake Workers](#)
[Applicant Search](#)
[Archive Search](#)
[Reassign Cases](#)
[Reports](#)
[Edit Account](#)

[Have a question?](#)

[Office Home](#) | [Assigned Cases](#)

Cases for Victor Angeles

Show 10 cases per page. Submit cases 1 - 4 of 4 Previous - Next

Applicant	Application	Submitted	Status	Add Notes	View Notes
<input type="checkbox"/> Laura Oppermann	Medicaid	04/19/2005 9:58 AM	Viewed	Add Notes	View
<input checked="" type="checkbox"/> Warren Davenport	Medicaid	03/08/2005 10:07 AM	Assigned	Add Notes	View
<input type="checkbox"/> Rusty Banks	Medicaid	03/11/2005 2:05 PM	Assigned	Add Notes	View
<input type="checkbox"/> Michelle Christopherson	Medicaid	04/05/2005 9:49 AM	Assigned	Add Notes	View

Assign selected cases to:

- Fox, Darren
- Angeles, Victor
- Fox, Darren
- Green, Rochelle
- Guest, Office
- Hood, Evelyn
- Ongoongotau, Simone
- Palmer, Leilani
- Parke, Dana
- Pitt, Brad
- Spafford, Kelly
- ** Unassigned **

Assign Selected Cases

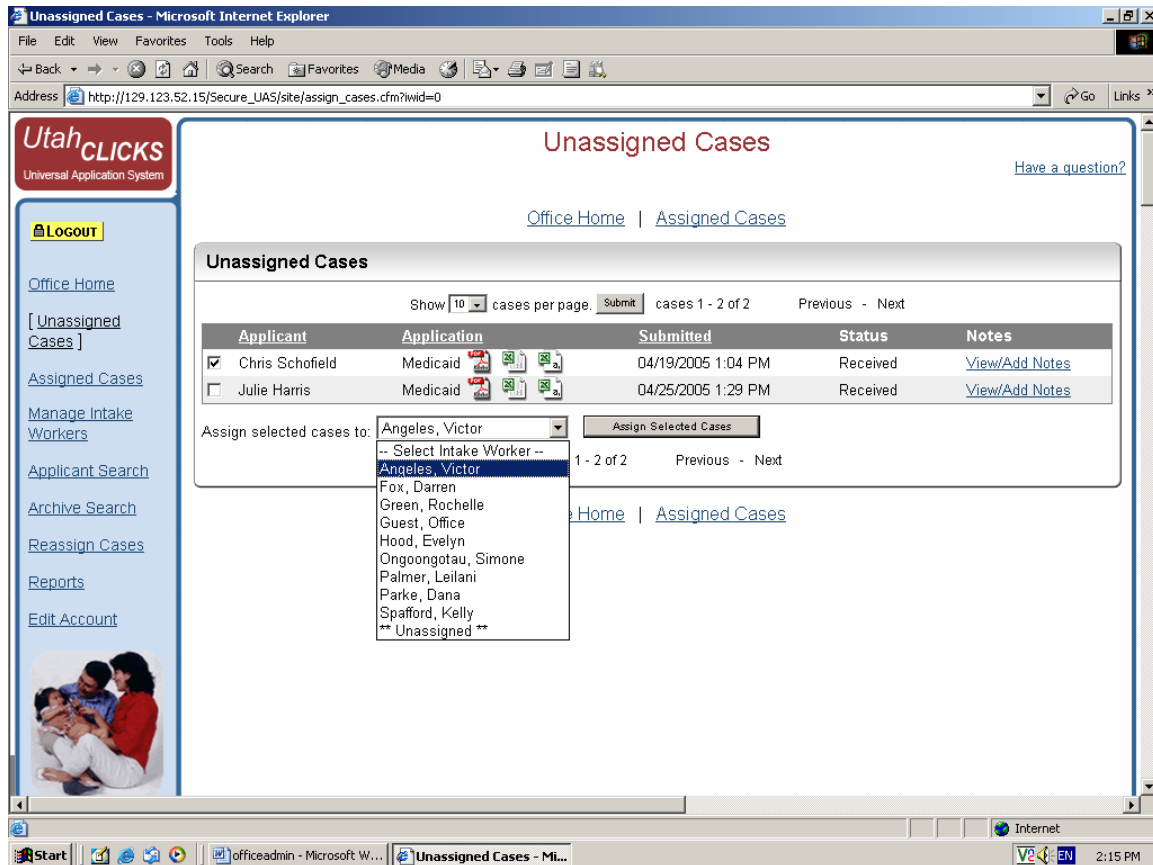
1 - 4 of 4 Previous - Next

[Office Home](#) | [Assigned Cases](#)

Viewing Assigned Cases for a Specific Caseworker

- To **view applications for an applicant**, click on the icon for the desired format you wish to view the information in (i.e., PDF, excel, etc.).
- To **add a case note for an applicant**, click on the Add Notes link for that applicant.
- To **view all notes submitted for an applicant**, click the View icon for that applicant below the View Notes heading.
- To **assign a case to another case worker**, click the box next to the applicant's name you wish to transfer to place a checkmark in the box. Then click on the drop box next to "Assign selected cases to:" and click on the case worker's name you want to transfer the case to. Finally, click on Assign Selected Cases to complete the reassignment.
- To return to the Office Administrator Home Page, click on the Office Home link.
- To view assigned cases for other case workers, click on Assigned Cases.

Section 3: Assigning Cases:



Assigning Cases from the Unassigned Cases Screen:

- To **assign a case to an intake worker**, click the box next to the unassigned applicant's name and then click the desired intake worker's name from the drop box next to "Assign selected cases to:."
- Click Assign Selected Cases once you have highlighted the intake worker's name to submit the assignment.

Section 4: Assigning Cases to Another Office:

Search For Cases to Move to Another Office

[Have a question?](#)

Search By Applicant Information

Search for an applicant by entering information in the fields below. Fields may be partially filled out or left blank. Example: If you would like to find someone with the last name of "Johnson" you could enter "Joh" in the last name field.

First Name:

Last Name:

Street:

City:

State:

Zip Code:

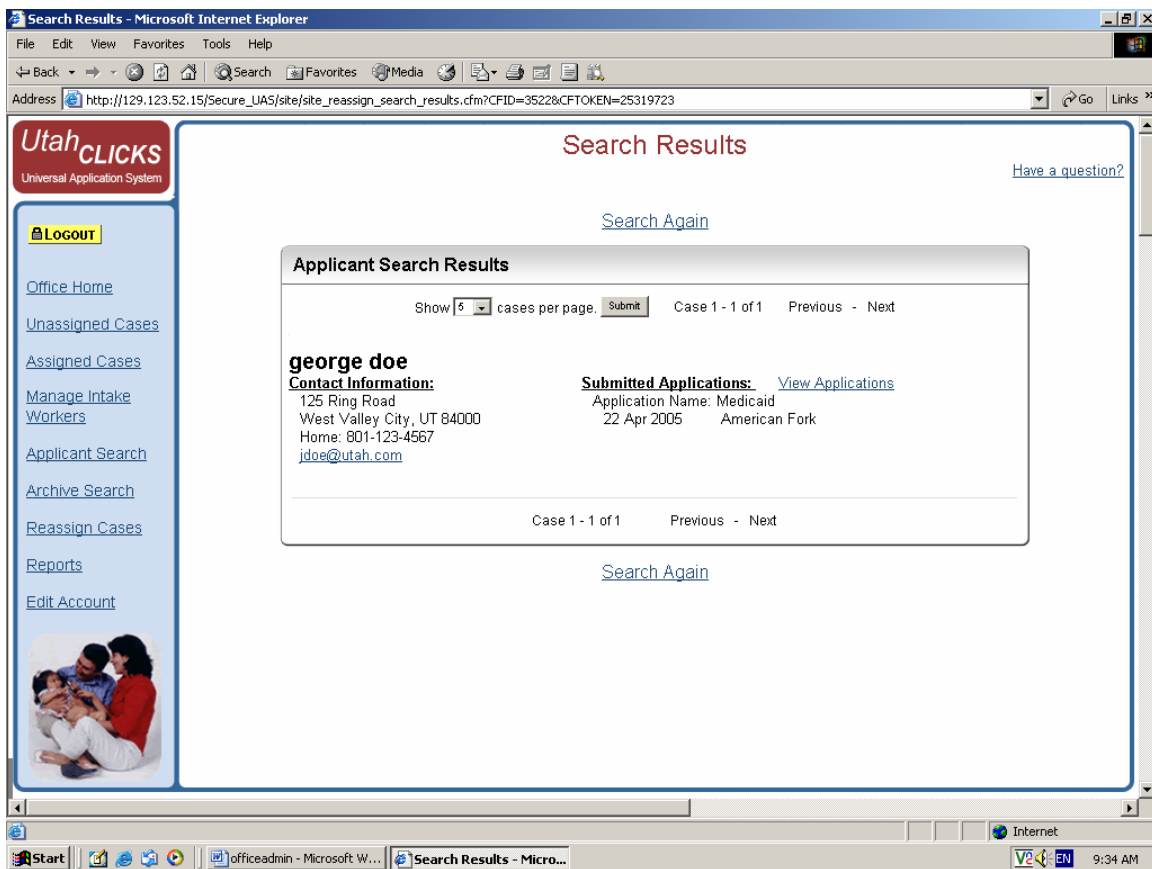
Phone:

Email:

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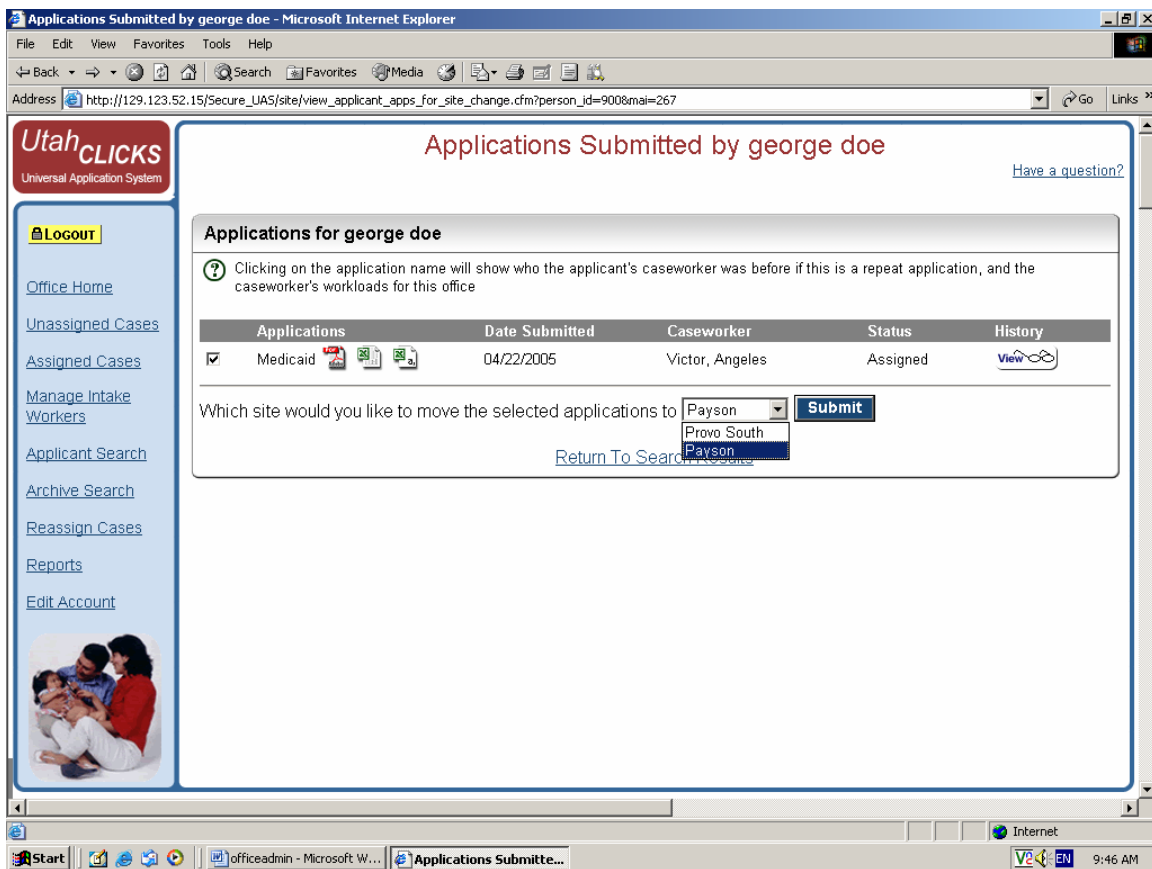
Assign Cases To Another Office - Step 1

- To **search for an applicant to be assigned to another office**, enter the applicant's identifying information (i.e., last name, first name, address, etc.) in the fields that coincide with this information.
- NOTE: fields may be partially filled out or left blank.
- To continue, click on Search.



Assign Cases To Another Office – Step 2

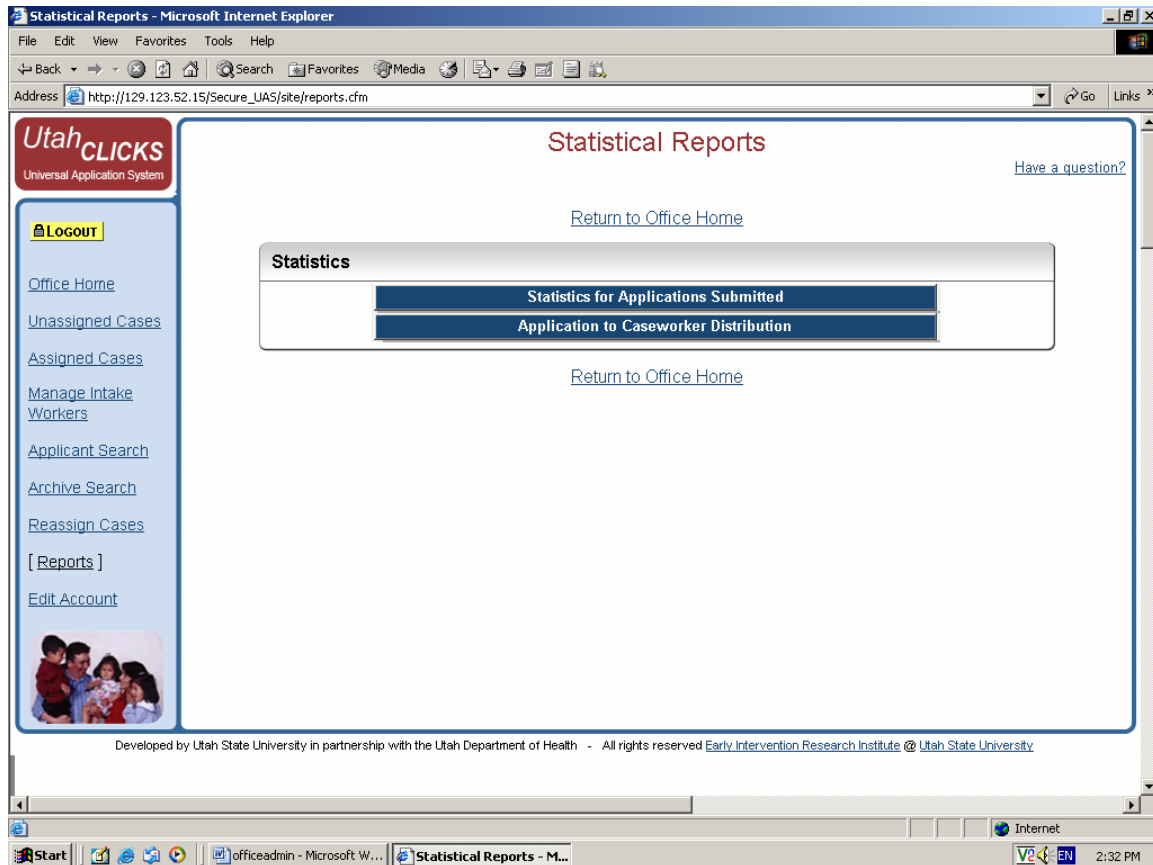
- If the applicant's information is displayed, click on View Application to continue.
- If the applicant is not found, a "No Matches Found" message will appear. Click on Search Again, which will return you to the Search Applicant screen.



Assign Cases To Another Office – Step 3

- Click on the box next to the application name to display a checkmark by the application you want to transfer.
- Click on the drop box below the applicant's information and choose the office where the case will be transferred.
- To continue, click Submit.

Section 5: Monitoring Office Statistics:

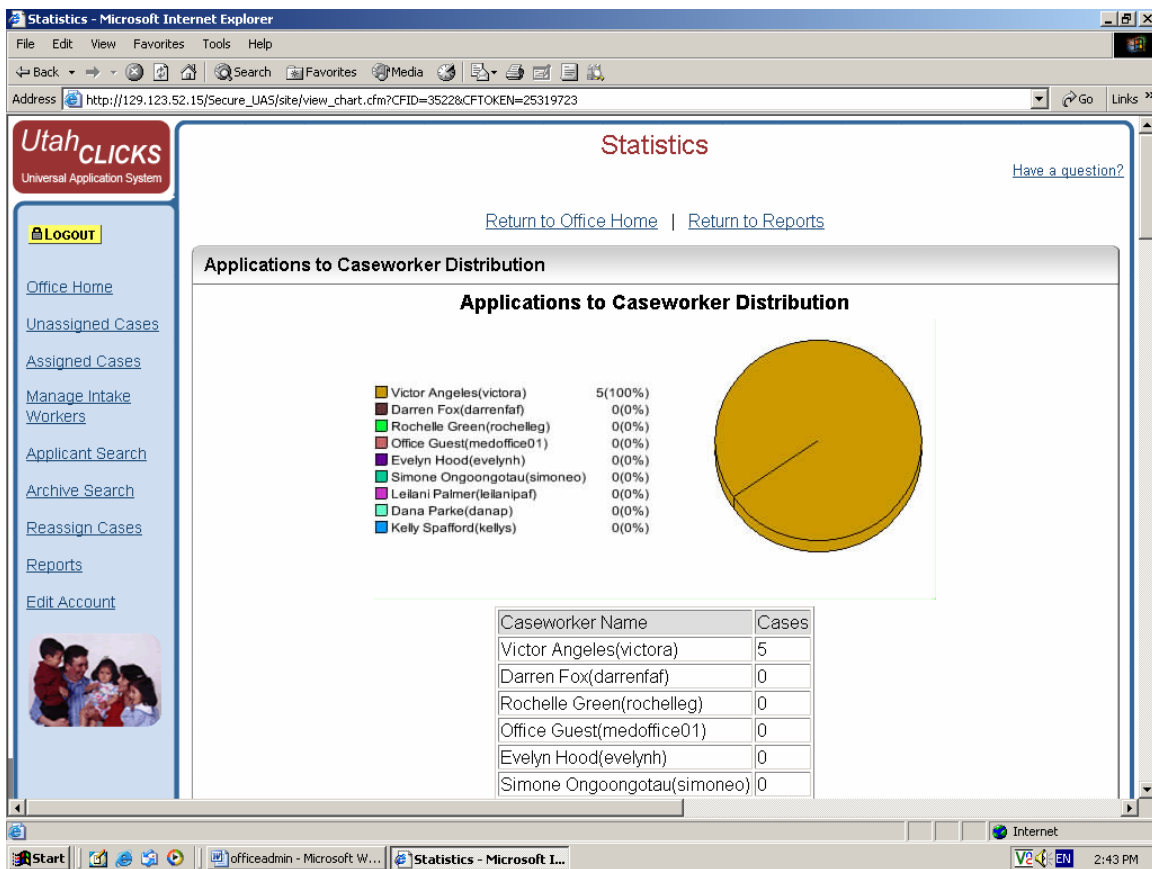


Monitoring Office Statistics

- To **see various statistical reports**, click on the report name listed under Statistical Reports that you would like to view.
- To return to the office administrator home page, click Return to Office Home.

Site Application Submission Statistics

- To **generate a graph comparing yearly totals**, click on the Yearly Comparison drop box and select the desired two years that are to be compared, and generate the graph by clicking Generate Graph. *Will this always be limited to 2 years?*
- To **generate a chart displaying monthly totals**, click on the Select Month drop box and select the desired month to be reviewed, and construct the chart by clicking Generate Chart. *Can you compare monthly totals on a chart from January 2003 to 2004 or why are there two options available for year?*
- To **generate a chart displaying the number of applications for a range of specific dates**, click on the corresponding drop boxes under Specified Date Range to select the desired months, days, and years for which information is needed. Click on Generate Chart to view that data in chart form.
- To **generate a graph comparing the number of applications submitted by day of the week over specified years**, click on the corresponding drop boxes under Compare Weekdays Over Several Years to select the desired years for which information is needed. Click on Compare Week Days to generate a graph.
- To **generate a graph comparing the number of applications submitted by day from the beginning of the UESAS system**, click on Compare Week Days under Compare Weekdays For The Life Of UESAS.



Application to Caseworker Distribution Report:

- To return to the office administrator home page from this screen, click Return to Office Home at the top of the screen.
- To return to the list of available reports, click Return to Reports at the top of the screen.

CHAPTER THREE: MANAGING INTAKE WORKERS & OFFICE ADMINISTRATOR INFORMATION

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Section 3: Editing an Intake Worker.....	21
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Section 1: Managing Intake Worker Information:

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Universal Application System

Logout

[Office Home](#)
[Unassigned Cases](#)
[Assigned Cases](#)
[[Manage Intake Workers](#)]
[Create](#)
[Edit/Delete](#)
[Applicant Search](#)
[Archive Search](#)
[Reassign Cases](#)
[Reports](#)
[Edit Account](#)

Manage Intake Workers

[Have a question?](#)

Manage Intake Worker Links

[Create Intake Worker Account](#)
[Edit or Delete Intake Worker Account](#)

Intake Workers

? To edit or delete an intake worker, click on their name. To view their applications click on the number

Intake Worker	Applications
Angeles, Victor	5
Fox, Darren (Office Manager)	0
Green, Rochelle	0
Guest, Office (Office Manager)	0
Hood, Evelyn	0
Ongoongotau, Simone	0
Palmer, Leilani (Office Manager)	0
Parke, Dana	0
Spafford, Kelly	0

Manage Intake Workers

Main Screen:

- To **add a new intake worker**, click on Create Intake Worker Account.
- To **edit intake worker information or delete an intake worker**, click on the highlighted intake worker's name under Intake Workers or click on Edit or Delete Intake Worker Account.
- To **view an intake worker's list of applications**, click on the highlighted number under Applications.

Section 2: Creating an Intake Worker Account:

Create Intake Worker

[Have a question?](#)

Create a New Intake Worker

New Intake Worker Information

First Name:

Last Name:

Email:

User Name:

Passwords must be at least 8 characters in length and consist of both letters and numbers.

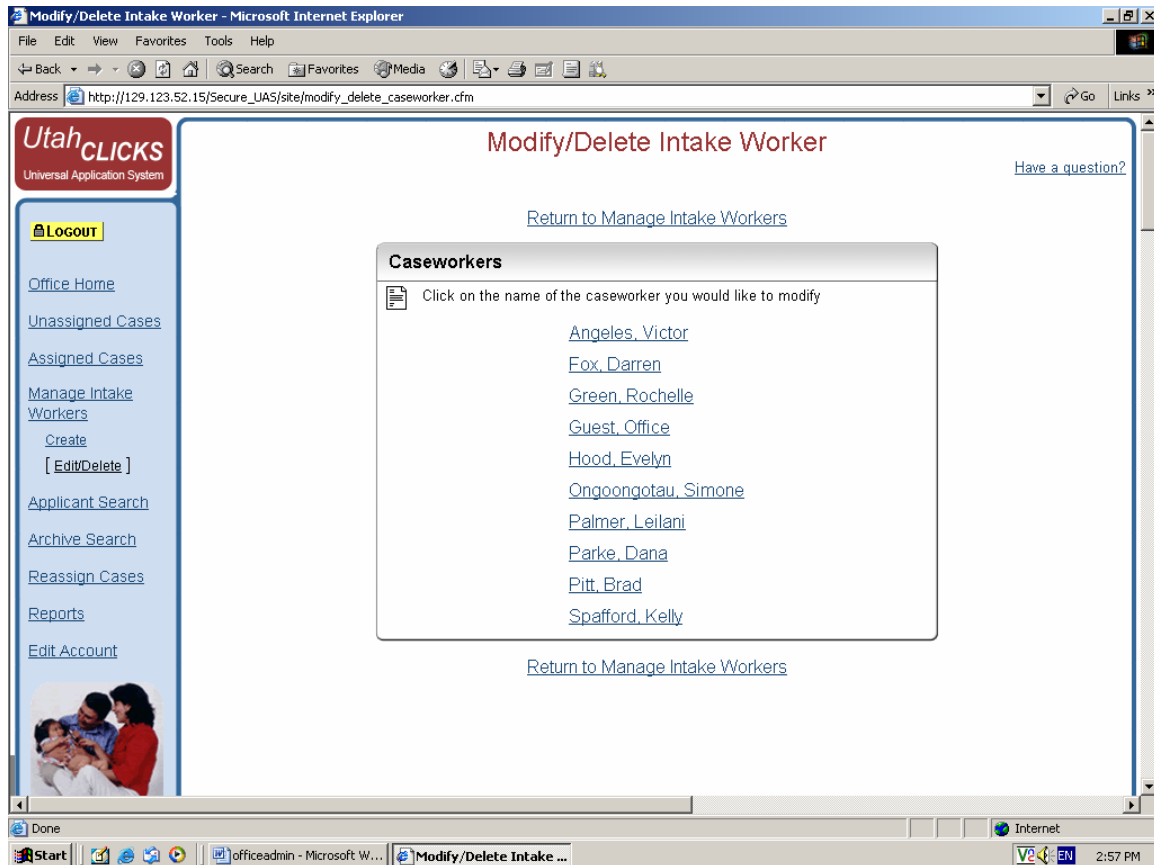
Password:

Confirm Password:

Create Intake worker

- **Enter the new intake worker's identifying information** (first name, last name) in the specified field.
- **Enter the password again** in the Confirm Password field.
- **Enter the new intake worker's email** in the Email field.
- **Enter the new intake worker's user name** in the User Name field.
- **Enter the new intake worker's password.** NOTE: Passwords must be at least 8 characters, consisting of letters and numbers.
- Click on Submit to **enter the new intake worker into the system.**

Section 3: Editing/Deleting Intake Worker Information:



- From the Modify/Delete Intake Worker screen, click on the worker's name whose account you wish to either edit or delete.

Section 3: Editing Intake Worker Information:

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[Logout](#)

[Office Home](#)
[Unassigned Cases](#)
[Assigned Cases](#)
[Manage Intake Workers](#)
[Applicant Search](#)
[Archive Search](#)
[Reassign Cases](#)
[Reports](#)
[Edit Account](#)

Modify/Delete Intake Worker

[Select a Different Intake Worker](#) | [Return to Manage Intake Workers](#)

[Have a question?](#)

Modify/Delete Caseworker

Update Caseworker Information

? To delete the caseworker, click on the delete link. To edit the caseworker's info, enter the information and click the update button

First Name:
 Last Name:
 User Name:
 Password:
 Retype Password:
 Email:

Other Options

Edit Intake Worker Information

- To **edit the intake worker's information**, fill in the identifying information fields with any new changes (i.e., name change, new email address) and click on Update.
- To **select a different intake worker to edit**, click on Select Another Caseworker under Other Options.

Section 4: Deleting an Intake Worker:

Modify/Delete Intake Worker - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address http://129.123.52.15/Secure_UAS/site/modify_delete_caseworker.cfm?caseworker=997 Go Links

[Logout](#)

[Office Home](#)

[Unassigned Cases](#)

[Assigned Cases](#)

[Manage Intake Workers](#)


[Applicant Search](#)

[Archive Search](#)

[Reassign Cases](#)

[Reports](#)

[Edit Account](#)



Modify/Delete Caseworker

Update Caseworker Information

? To delete the caseworker, click on the delete link. To edit the caseworker's info, enter the information and click the update button

First Name

Last Name

User Name

Password

Retype Password

Email

Other Options

[Select a Different Intake Worker](#) | [Return to Manage Intake Workers](#)

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Start | officeadmin - Microsoft W... | Modify/Delete Intake ... | Internet | 3:18 PM

Delete Intake Worker Information

- To **delete an intake worker**, enter the intake worker's identifying information in the corresponding fields.
- Click on Delete This Caseworker below Other Options.
- To **select a different intake worker to edit**, click on Select Another Caseworker under Other Options.

Section 5: Editing Office Administrator Information:

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Edit Your Account

[Have a question?](#)

[Return to Office Home](#)

Edit Your Account

Your current information is displayed in the textboxes. If you would like to change any information delete the current value and type in the desired value.

Your Information

Email Address:

If you forget your password you can request a new one be sent to this email address.

User Name:

Password:

Re-type Password:

[Edit Account](#)

[Return to Office Home](#)

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Editing Office Administrator Information:

- To **edit the office administrator's account information**, delete the current values in the fields you would like to change and type in the new information for that field.

CHAPTER FOUR: SEARCHING FOR APPLICATIONS

Section 1: Searching by Applicant Information.....26

Section 2: Searching Application Archives.....27

Section 1: Search for Applicant:

American Fork - Applicant Search

Have a question?

Search By Applicant Information

Search for an applicant by entering information in the fields below. Fields may be partially filled out or left blank. Example: If you would like to find someone with the last name of "Johnson" you could enter "Joh" in the last name field.

First Name:

Last Name:

Street:

City:

State:

Zip Code:

Phone: (801)555-1212 format

Email:

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Debugging Information

ColdFusion Server Standard 6,1,0,63958

Template /Secure_UAS/caseworker/applicant_search.cfm

Search for an Applicant (from the sidebar menu):

- To **search for an applicant**, type in identifying information in the fields provided (i.e., last name, first name, street address, etc.).
- NOTE: fields may be partially filled out or left blank.
- To **search for the applicant once the identifying fields are completed**, click on Search at the bottom of the main screen.

Section 2: Application Archive Search:

Search Archive - Microsoft Internet Explorer

Address: http://129.123.52.15/Secure_UAS/caseworker/search_archive.cfm

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[Logout](#)

[Office Home](#)

[Intake Worker Home](#)

[Case Inbox](#)

[Applicant Search](#)

[\[Archive Search \]](#)

Search Archive

[Have a question?](#)

Search By

- [Intake Worker](#)

Search for an Archived Application

Applicant First Name:

Applicant Last Name:

Start Date:

End Date:

[Clear Search Results](#)

Search Results

⚠ There are no matching cases.

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Debugging Information

ColdFusion Server Standard 6,1,0,63958

Template /Secure_UAS/caseworker/search_archive.cfm

Time Stamp 25-Apr-05 03:29 PM

Locale English (US)

User Agent Mozilla/4.0 (compatible; MSIE 6.0; Windows NT 5.0; .NET CLR 1.1.4322)

Start | officeadmin - Microsoft W... | Search Archive - Micro... | 3:25 PM

Application Archive Search (from sidebar menu):

- To search the archives for a former applicant by assigned intake worker, click the Intake Worker link at the top left corner of the screen.
- To search by the applicant's identifying information in the First Name and Last Name fields.
- Enter a range of dates in the Start Date and End Date fields that information is required from.
- *Does all information have to be entered?*